Planned Work and Asset Manager

User Manual

© Elogbooks Facilities Management Ltd, 2012

Contents

Introduction 3

The Process – Basic Overview 4

Accessing the Planned Work and Asset Manager 5

The Tabs 6

Stage 1: Create Asset and Task Lists 7

Downloading the Template 7

Creating You Own Spreadsheets 7

Filling In The Spreadsheet 8

Column Descriptions 9

FAQs 10

Preparing The Spreadsheet For Import 11

Checking The CSV File 12

Stage 2: Import Asset and Task List 13

Choose The Property 13

Find The CSV File 13

Stage 3: Manage Your Assets and Tasks 16

Changing The Data 16

Uploading A Picture 17

Stage 4: Setting Your Planned Dates 18

Example Date Scheduling 19

Creating The Planned Dates 20

Moving a Scheduled Date 21

Deleting a Scheduled Date 22

Balancing Your Work 22

Stage 5: Review Your Planner 23

Stage 6: Submit For Approval 24

Introduction

The PPM Planner in your Service Provider's Logbook describes all of the planned maintenance works and/or scheduled tasks that you carry out at the client's property. This work falls into 2 distinct categories, as follows -

- "Hard services" – M&E maintenance of physical assets, e.g. boilers, lifts etc
- "Soft services" – General scheduled tasks, e.g. cleaning, window cleaning, grass cutting etc

When you are awarded a contract for a company that operates the Elogbook system, and prior to the commencement of the actual contracted works, you will be required to create and upload a list of the assets that you provide "hard" services for, and a list of the tasks for which you do "soft" services. This list of assets and tasks will then be uploaded to the Elogbooks system to form the basis of your PPM Planner.

The PPM planner is then used to create all of the individual jobs that go to make up the schedule, and it is these jobs that are used to record and track the actual work being done, whether that is an annual boiler maintenance task, a monthly lift inspection or a weekly grass cut.

The process of creating the asset/task list, uploading it to Elogbooks and scheduling out all the works into the PPM Planner is achieved using the **Planned Work and Asset Manager** feature in your Service Provider's logbook, and is fully described in this manual.

If you need general information on Planned Maintenance and the PPM Planner, or if you need help accessing or using your Service Provider's Logbook, see the separate "Service Provider's Logbook" manual.

The Process – Basic Overview

The PPM upload and scheduling process, which we will refer to generally in this manual as the "PPM Upload" process, involves the following key stages -

- Create a separate asset and task list for each property at which you carry out "hard" and/or "soft" services.

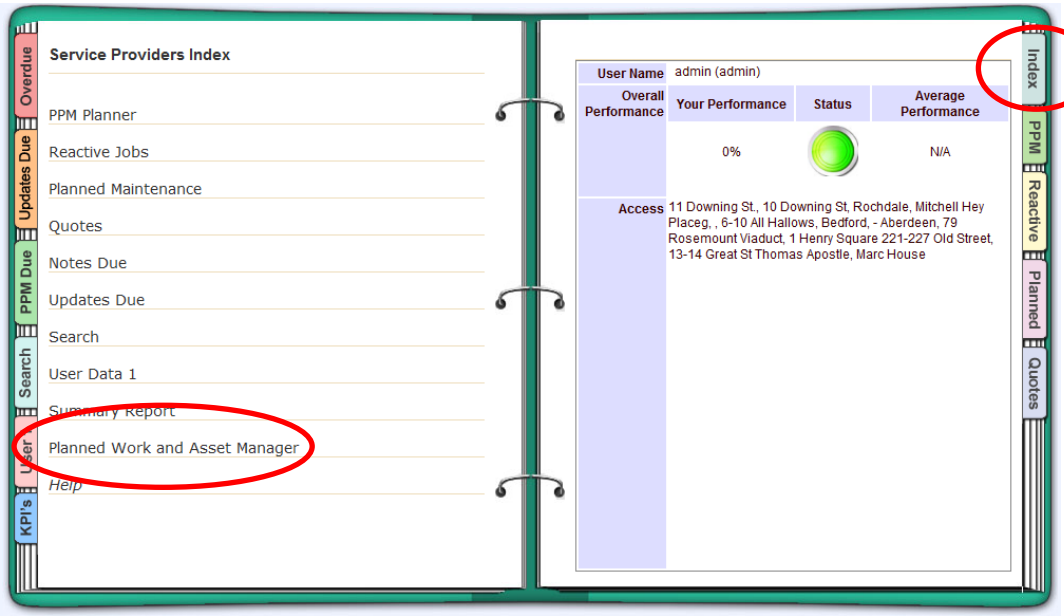
- Upload your asset and task list(s) to the client's Elogbook system, and then create the schedule to describe when the maintenance and tasks will be carried out.

- Optionally tailor the schedule of work at one property to balance it against work you've scheduled for the same day, either at the same property or any of the other properties at which you do work for the client.

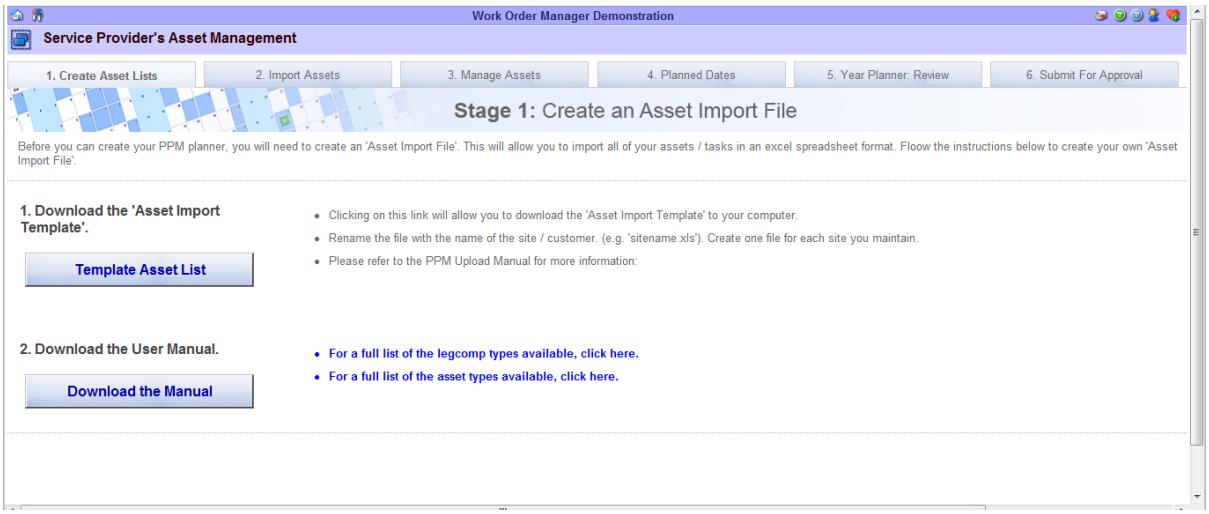
- Once you're happy with your schedules, submit them to the FMs or building managers for their approval.

Accessing the Planned Work and Asset Manager

On the **Index** page of your Service Provider's logbook, on the left-hand side you'll see a link labelled "Planned Work and Asset Manager" –



Click on the link and it will take you to the Service Provider's Asset Management page –


Work Order Manager Demonstration
Service Provider's Asset Management
1. Create Asset Lists
2. Import Assets
3. Manage Assets
4. Planned Dates
5. Year Planner: Review
6. Submit For Approval
Stage 1: Create an Asset Import File
Before you can create your PPM planner, you will need to create an 'Asset Import File'. This will allow you to import all of your assets / tasks in an excel spreadsheet format. Floow the instructions below to create your own 'Asset Import File'.
1. Download the 'Asset Import Template'.
Template Asset List
Clicking on this link will allow you to download the 'Asset Import Template' to your computer.
Rename the file with the name of the site / customer. (e.g. 'sitename.xls'). Create one file for each site you maintain.
Please refer to the PPM Upload Manual for more information:
2. Download the User Manual.
Download the Manual
For a full list of the legcomp types available, click here.
For a full list of the asset types available, click here.

The Tabs

Across the top of the page, you'll see several tabs outlining the separate stages of the PPM Upload process –

- **Stage 1 – Create Asset Lists.**

  On this tab you will download a template spreadsheet, which you will use as the basis for your asset and task lists. You will copy the template to create a separate spreadsheet for each property at which you do work.

- **Stage 2 – Import Assets.**

  Once you have created an asset and task list, you will use this tab to import the list into the Elogbooks system ready to start setting up the actual work schedule.

- **Stage 3 – Manage Asset.**

  Once you have imported your asset and task list, the details of each asset and task can then be viewed and edited as required.

- **Stage 4 – Planned Dates.**

  In this section you will then set the date(s) that the planned maintenance will take place on each "hard" asset (e.g. boiler maintenance), and when each "soft" task will be done (e.g. grass cutting). Once you've set the provisional schedule and date(s), you can optionally move them around, perhaps to balance out your work at this property, or other properties at which you do work for this client.

- **Stage 5 – Year Planner Review.**

  Once you have set all the dates and you are happy with them, you can review them in the consolidated PPM Planner, which will show all of the "hard" and "soft" tasks that you are currently setting up (as well as all your existing tasks that may have been previously setup and approved).

- **Stage 6 – Submit for approval.**

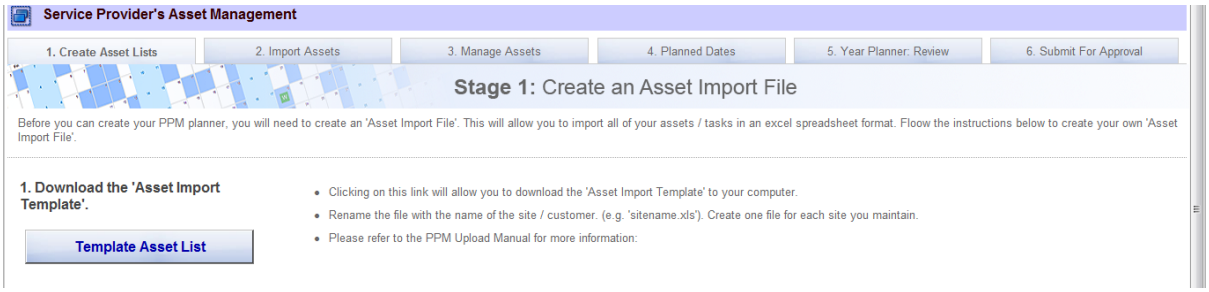
  When you are happy with the planner, you can then submit it for approval. You can either submit the schedule for just one property, or if you have uploaded several lists and planned a schedule for several properties, you can optionally send them all for approval at the same time. The approval request will be sent via email to the FM or building manager responsible for each of the properties where the schedule needs to be approved.

Stage 1: Create Asset and Task Lists

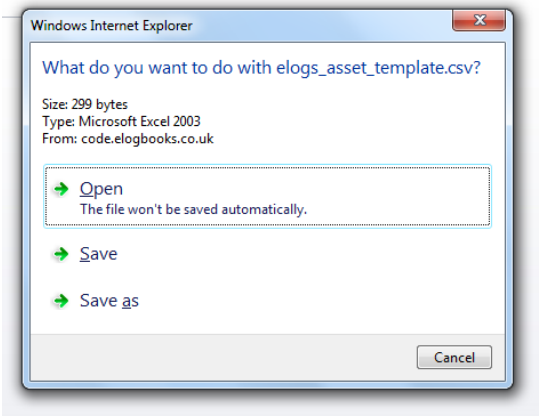
Downloading the Template

The first step in the process is to download a template spreadsheet that you will use as the basis for creating your own asset and task lists.

Click on the **Template Asset List** button -


Service Provider's Asset Management
1. Create Asset Lists
2. Import Assets
3. Manage Assets
4. Planned Dates
5. Year Planner: Review
6. Submit For Approval
Stage 1: Create an Asset Import File
Before you can create your PPM planner, you will need to create an 'Asset Import File'. This will allow you to import all of your assets / tasks in an excel spreadsheet format. Floow the instructions below to create your own 'Asset Import File'.
1. Download the 'Asset Import Template'.
Template Asset List
Clicking on this link will allow you to download the 'Asset Import Template' to your computer.
Rename the file with the name of the site / customer. (e.g. 'sitename.xls'). Create one file for each site you maintain.
Please refer to the PPM Upload Manual for more information:

You will get a prompt like this –



Click **SAVE AS** and save the template spreadsheet to a location on your local hard disk.

Creating Your Own Spreadsheets

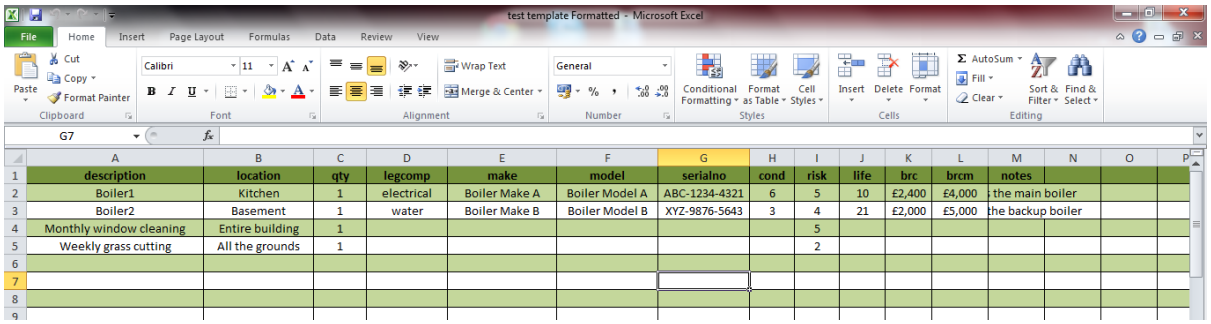
Once you have the template spreadsheet saved on your local hard disk,

- Copy the template to create a new one.
- Give it a name that reflects the property at which the asset and task list applies.
- Repeat the process for each property, so that you have a *separate* list for each of the client's properties at which you do work.

.

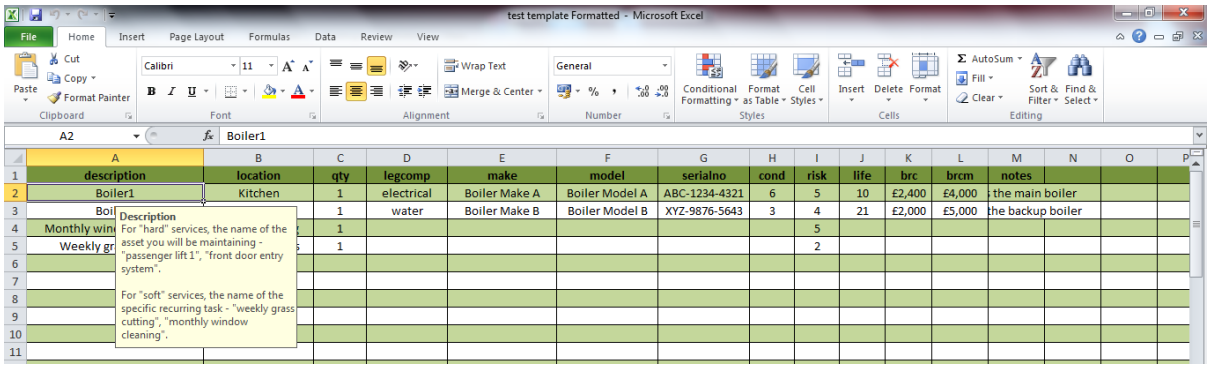
Filling In The Spreadsheet

When you open your spreadsheet with Excel it will look like the one below, and it will contain several illustrative examples of “hard” maintenance (on boilers) and “soft” tasks (window cleaning and grass cutting). You can delete these lines once you start entering your own data.

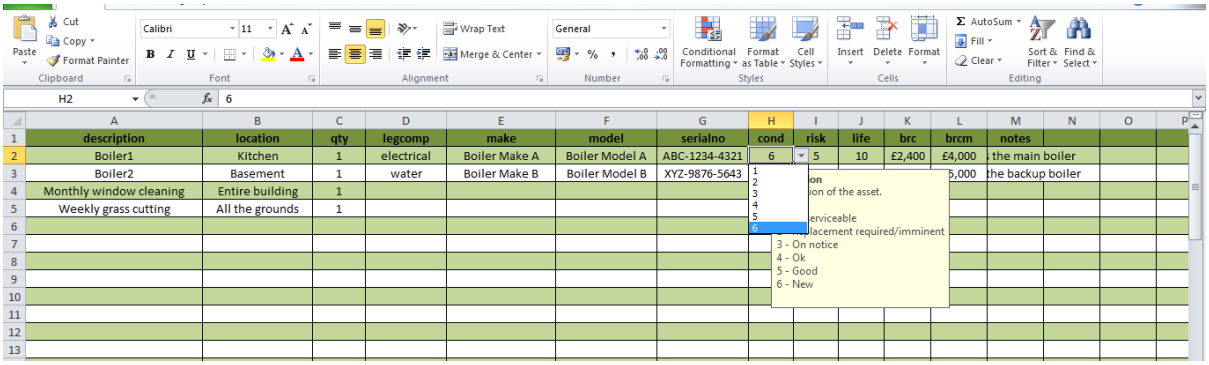


description	location	qty	legcomp	make	model	serialno	cond	risk	life	brc	brcm	notes
Boiler1	Kitchen	1	electrical	Boiler Make A	Boiler Model A	ABC-1234-4321	6	5	10	£2,400	£4,000	the main boiler
Boiler2	Basement	1	water	Boiler Make B	Boiler Model B	XYZ-9876-5643	3	4	21	£2,000	£5,000	the backup boiler
Monthly window cleaning	Entire building	1						5				
Weekly grass cutting	All the grounds	1						2				

Fill-in the spreadsheet as required. As you click on each column, you will see some guidance on what you need to enter -


Description
For "hard" services, the name of the asset you will be maintaining - "passenger lift 1", "front door entry system".
For "soft" services, the name of the specific recurring task - "weekly grass cutting", "monthly window cleaning".

The column contents and controls are varied. Some are free-form text (e.g. description, location, make, model) and some are forced as numeric (e.g. Qty). There are also some columns that are fixed form text or numeric, with the content being selected from a drop-down box. Shown below is the selection of the Condition Code, which must be a value of 1 – 6.



Column Descriptions

Here is a summary description of all the columns in the spreadhseet.

Column heading	Description
Description	**Hard Services**. The name of the asset. Each asset at a property must have a unique name, so if you have two boilers, call them “Boiler1” and “Boiler2” **Soft Services**. The name of the specific recurring task, e.g. “Weekly Grass cutting” or “Monthly Window Cleaning”.
Location	**Hard Services**. The physical location of the asset. **Soft Services**. The location where the recurring task will take place.
Qty	**Hard Services**. The number of assets included in the recurring service routine. For example, in an emergency lights job, you would not want to create a separate asset line for each light. So, the asset description would be “emergency lights’, the location might be ‘1st floor’ and the Qty will be the number of lights. **Soft Services**. Value must be set as 1 ,
Legcomp	**Hard Services**. If this task has a legal requirement, select the appropriate value from the drop-down box. **Soft Services**. Ignore, can be left blank
Make Model Serial No	**Hard Services**. The manufacturer’s make, model and serial number for the asset. **Soft Services**. Ignore, can be left blank
Cond	**Hard Services**. The condition of the asset. Select the value from the drop-down box provided. Values are – • 1 – Un serviceable • 2 – Replacement required/imminent • 3 – On Notice (client has been advised) • 4 – Ok • 5 – Good • 6 – New **Soft Services**. Ignore, can be left blank
Risk	**Hard *and* Soft Services**. The risk level for works. Select the value from the drop-down box provided. • 1 - None • 2 - Low • 3 - Medium • 4 - High • 5 – Extreme

Life	**Hard Services**. The estimated remaining lifespan of the asset (in years). **Soft Services**. Ignore, can be left blank.
Brc	**Hard Services**. Budget Replacement Cost (Labour only) for the asset. **Soft Services**. Ignore, can be left blank.
Brcm	**Hard Services**. Budget Replacement Cost (Parts and Materials) for the asset. **Soft Services**. Ignore, can be left blank.
Notes	This is a free text field into which you can enter any additional description or notes for the asset or task.

FAQs

Some of the headings don't apply to the task/job, what do I do?

No problem, just fill-out what's applicable

Can I put the assets/tasks for more than one property on the same sheet?

No. You must create a separate spreadsheet for each property. To make the import process easier, you should give each spreadsheet a name that reflects the property name so that it is easier to match up during the import process.

Can I add extra columns to the spreadsheet?

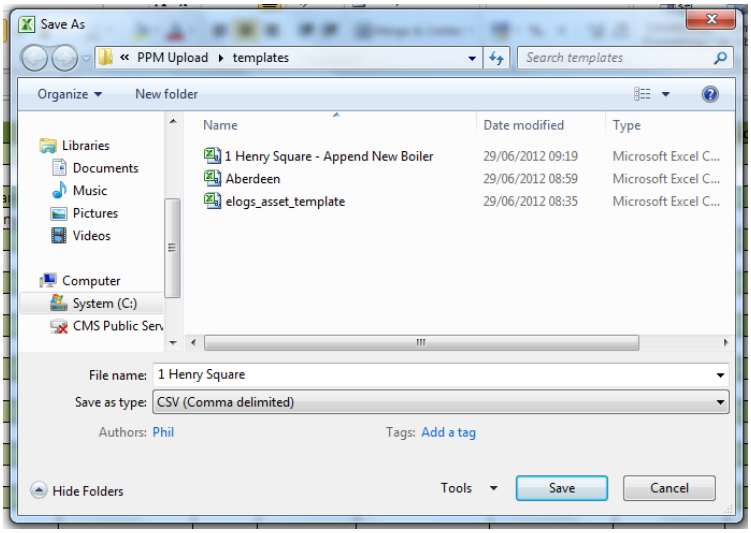
Yes you can, but the data in those extra columns will be for your own information or documentation purposes and will NOT be imported into the Elogbooks system.

Preparing The Spreadsheet For Import

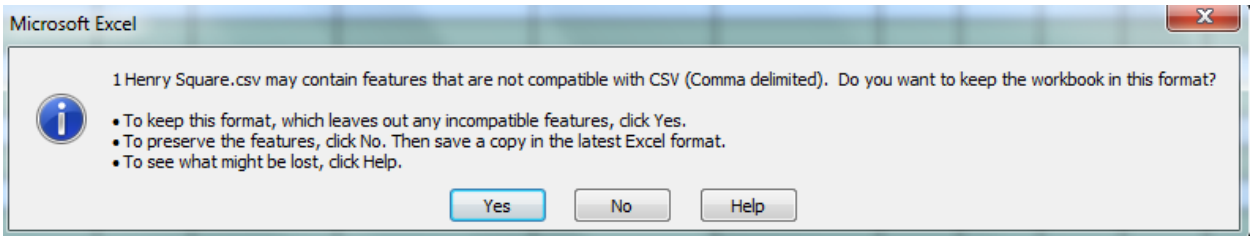
Note: This step is very important and should be done carefully to ensure that the import process works correctly.

Once you have filled-in your asset and task list for a property, you are ready to upload it to the client's Elogbook system.

- Do a **SAVE** within Excel to make sure that you have saved a base copy of your spreadsheet
- Then do a **SAVE AS** to save a separate copy of the file.
- In the SAVE AS window (see below), select **CSV (Comma Delimited)** as the Save As Type

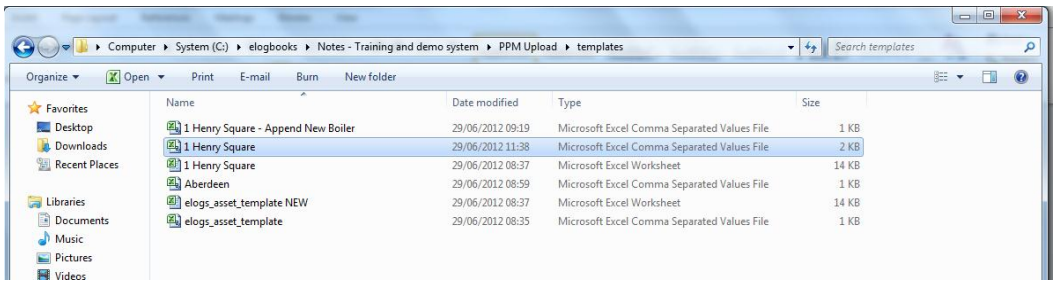


- Click **Save** in the window above to save the new CSV file.
- Click Yes to the prompt below (this will save the file in CSV format but remove all of the help features and drop-down boxes that were part of the original template).


Microsoft Excel
1 Henry Square.csv may contain features that are not compatible with CSV (Comma delimited). Do you want to keep the workbook in this format?
• To keep this format, which leaves out any incompatible features, click Yes.
• To preserve the features, click No. Then save a copy in the latest Excel format.
• To see what might be lost, click Help.
Yes
No
Help

Checking The CSV File

Before you move onto the next step, check the folder on your local hard drive to make sure that you have definitely created and saved a separate CSV version of your original asset and task spreadsheet -

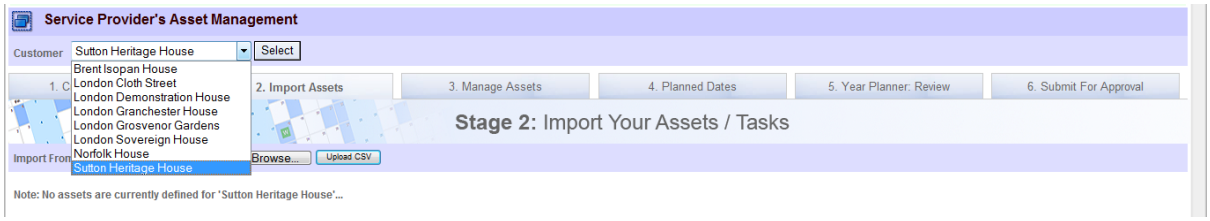

Computer ▸ System (C:) ▸ elogbooks ▸ Notes - Training and demo system ▸ PPM Upload ▸ templates
Search templates
Organize
Open
Print
E-mail
Burn
New folder
Favorites
Desktop
Downloads
Recent Places
Libraries
Documents
Music
Pictures
Videos
Name
Date modified
Type
Size
1 Henry Square - Append New Boiler 29/06/2012 09:19 Microsoft Excel Comma Separated Values File 1 KB
1 Henry Square 29/06/2012 11:38 Microsoft Excel Comma Separated Values File 2 KB
1 Henry Square 29/06/2012 08:37 Microsoft Excel Worksheet 14 KB
Aberdeen 29/06/2012 08:59 Microsoft Excel Comma Separated Values File 1 KB
elogs_asset_template NEW 29/06/2012 08:37 Microsoft Excel Worksheet 14 KB
elogs_asset_template 29/06/2012 08:35 Microsoft Excel Comma Separated Values File 1 KB

Stage 2: Import Asset and Task List

The next stage in the process is to upload your CSV file and import the data into the Elogbooks system. Click on the tab labelled "**2. Import Assets**"

Choose the Property

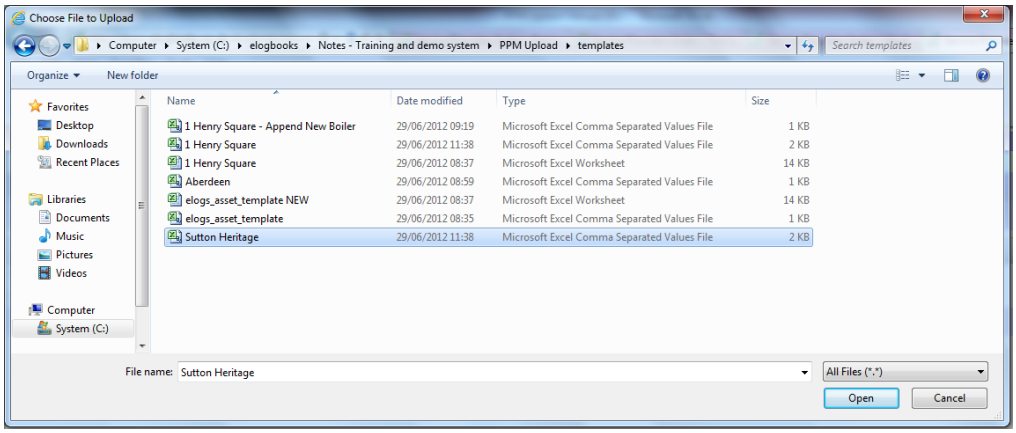
Choose the property from the **Customer** drop down list. In our example below we are selecting the property called Sutton Heritage House.



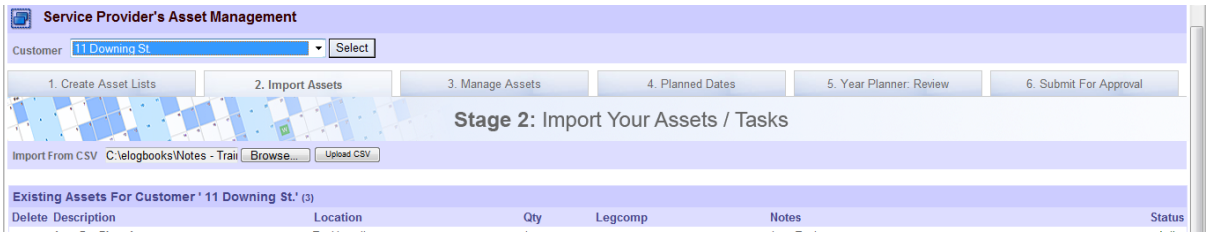
Find the CSV File

Once you have the right property selected, click on the **Browse** button -

Locate the **CSV** file you've created for the property. Make sure you pick the *CSV version* and not the original Excel spreadsheet. Then click **Open** to select it.



The filename will appear in the **Import From CSV** box, and you can then click the **Upload CSV** button to upload it –

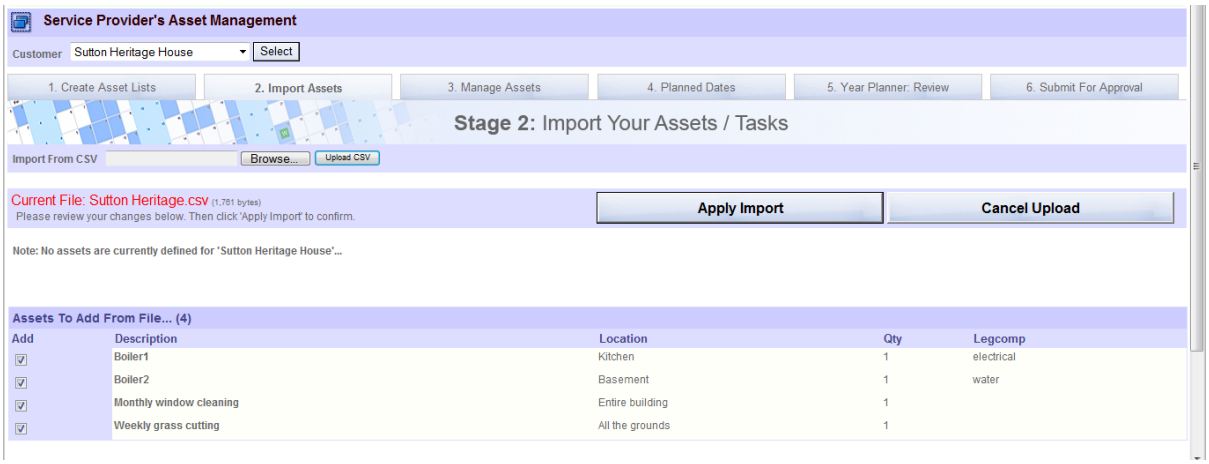


The Asset Management screen will then be updated to look like the one below.

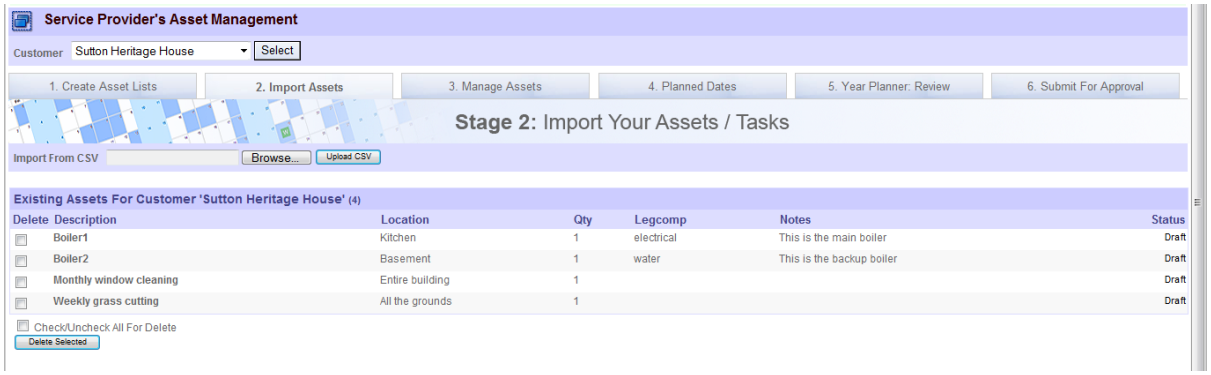
- In red, you will see the name of your **CSV file** that has been uploaded.
- Below the red message is a confirmation that no assets or tasks are currently defined for this property.

  See the "Adding New Assets and Tasks" section for details on how to add additional assets and tasks to a property after an initial upload and import has been done.

- At the bottom, you will see a **list of the assets** and tasks that were in your CSV file
- Assuming all looks ok, click the **Apply Import** button to action the import process.



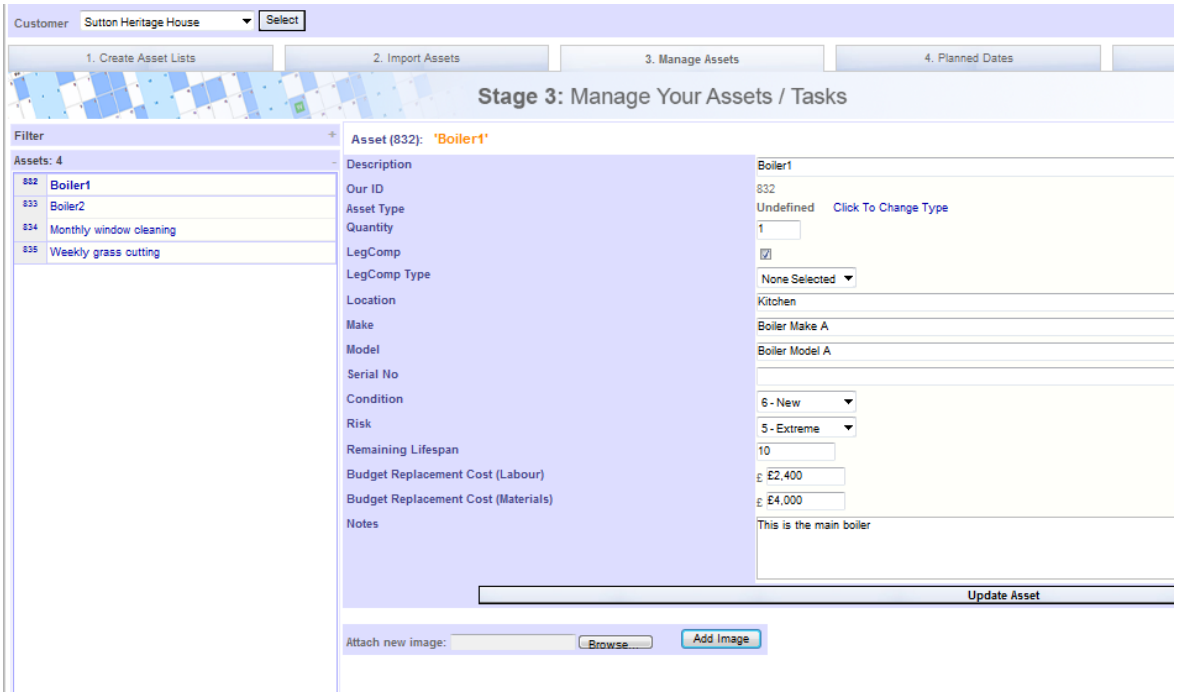
After a brief pause, the screen will update to show that the assets and tasks have now been imported into the system and associated with the selected property.



You have the option at this point to delete one or more of the assets, which can be done by clicking the **Delete** box to the left of the asset and then clicking on the **Delete Selected** button.

Stage 3: Manage Your Assets and Tasks

Once you have completed the import process, you can then click on the tab labelled "3. Manage Assets", which will take you to the **Stage 3: Manage Your Assets / Tasks** screen –



- On the left-hand side of the screen you will see a list of the assets and tasks that you imported from your CSV file.

- On the right-hand side of the screen you will see the details of the asset or task that you have highlighted in the list. In this display you will see all of the data that was taken from your CSV file, and there are also several new fields as well.

Changing the Data

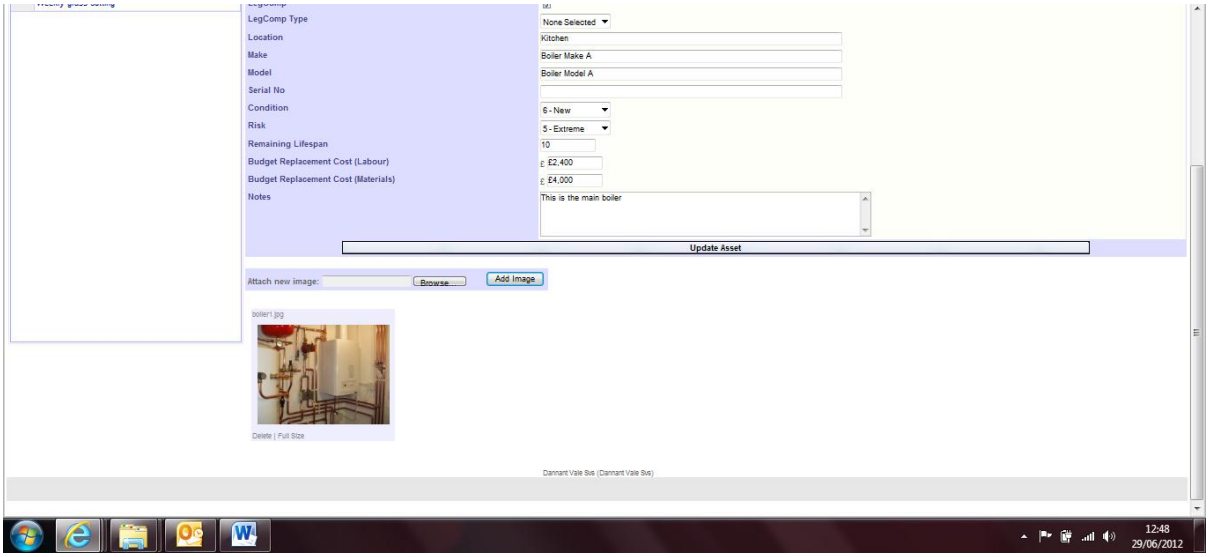
At this point you can change the data in any way you wish. Simply edit the field(s) and click on the **Update Asset** button to update the asset or task's details.

Important Note: Once you have imported the data from your CSV, the data control and management of the assets and tasks is done entirely within the Elogbooks system, so any changes that you make in the Manage Your Assets screen will not be reflected back into your original CSV file.

Uploading A Picture

If you wish, you can upload an image of an asset or task. Below the Update Asset button you will see a section labelled “Add New Image”…

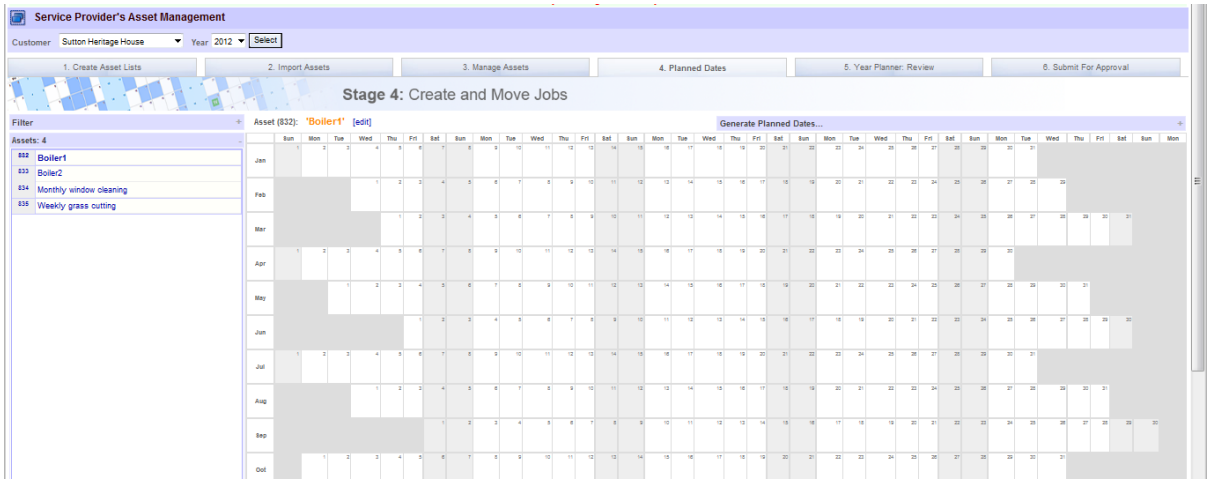
Click on the **Browse** button to locate an image on your local hard drive, then click on the **Add Image** button to add your image -



Stage 4: Setting Your Planned Dates

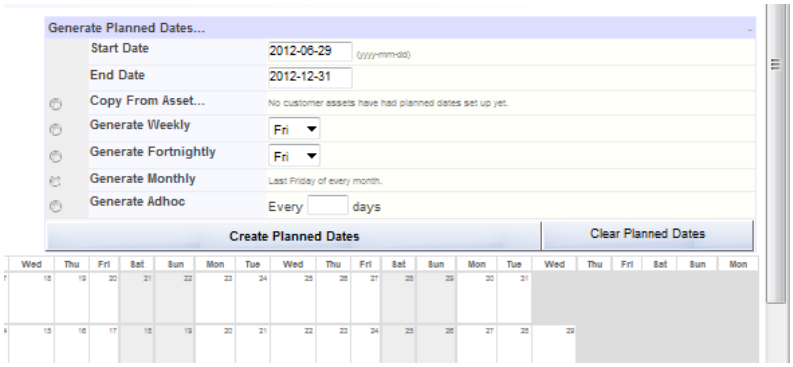
When you have made your updates and changes to the asset and task definitions, you are then ready to start planning out the dates that the actual work will take place, and then creating the individual planned jobs that will be related to that work.

This is all done with the tab labelled “4. Planned Dates”.



- On the left-hand side of the screen you will see a list of your assets and tasks.
- In the centre and right of the screen you’ll see an empty year planner.

Just above the blank planner is a link labelled “Generate Planned Dates”. When you are ready to start generating the planned dates for an asset or task, click on this link and you will see the following screen appear above the planner –



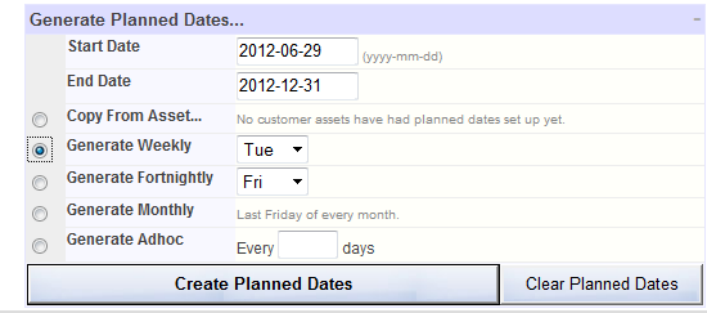
Using the above screen you can set up the date(s) that the “hard” maintenance or “soft” task will take place. This may be a one-off adhoc date, or it might be a sequence of recurring dates throughout the year.

Example Date Scheduling

Shown below are some examples of date scheduling.

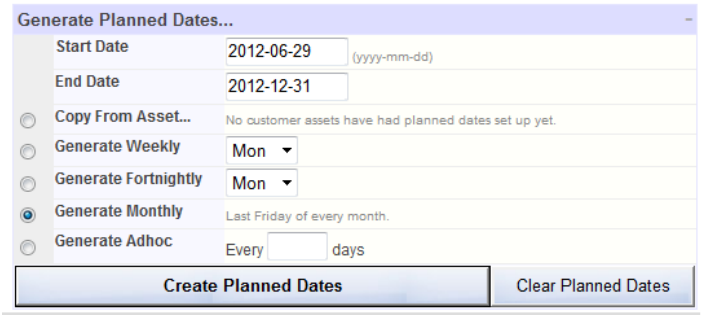
In this first example, we are scheduling a **weekly** job, which will be done on a Tuesday.

As we are already part way through the year, we have set the start date to be from today (29th June) and to run until the end of the calendar year.

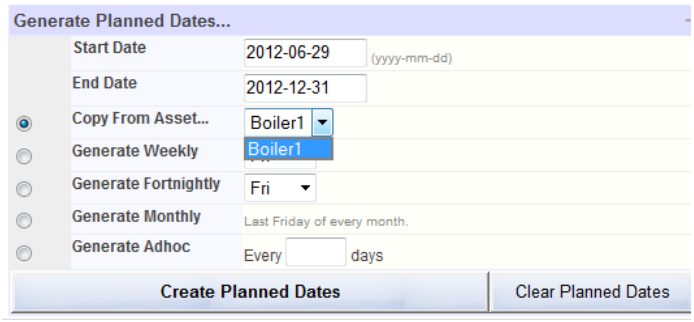


In this example we are generating a **monthly** job.

It will automatically be scheduled in to the last Friday of every month, but as explained later, this day can be changed if required.



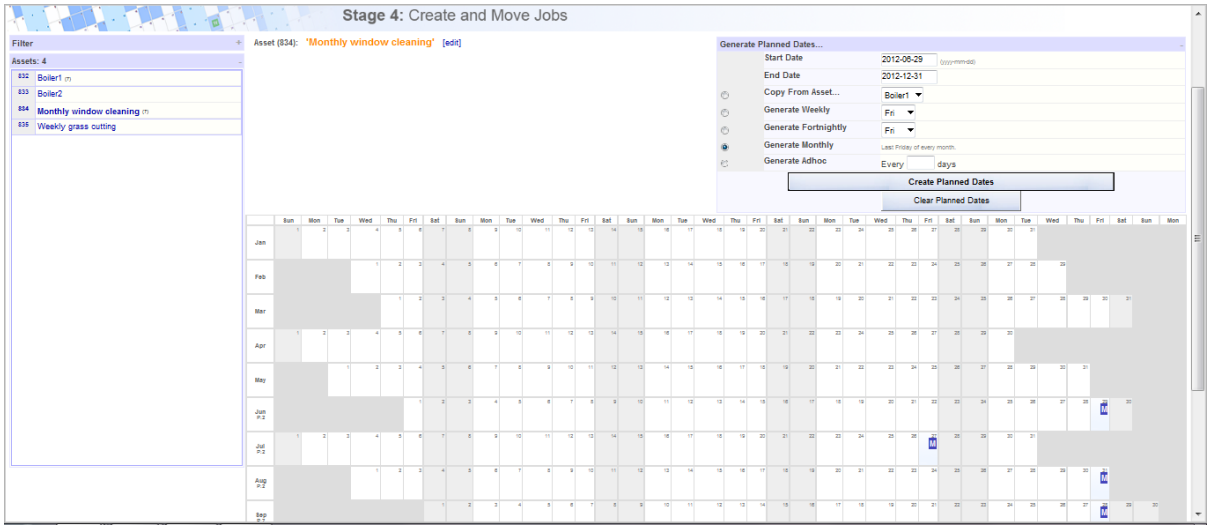
And in this example, we are taking advantage of the useful "Copy From Asset" feature, which allows us to apply a schedule based on one that has already been setup for another asset. In this case we are creating a schedule based on the one we previously set for boiler 1.



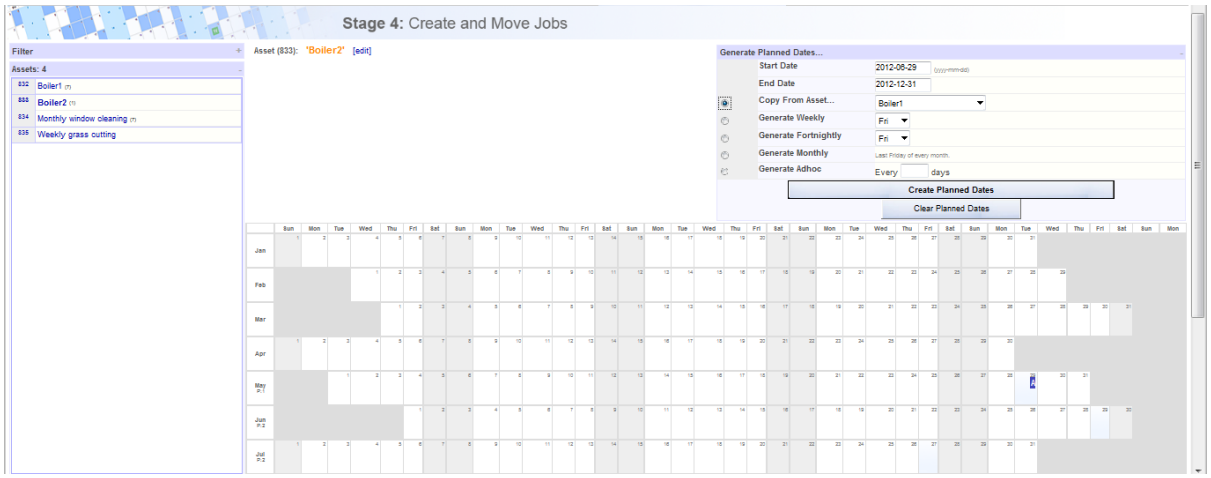
Creating the Planned Dates

Once you have set the scheduled date(s) for an asset or task, just click on the **Create Planned Dates** button to generate the job's Planned Date(s)

Shown below is an example where we have created the planned dates for our Monthly Window Cleaning task, which has been scheduled to take place on the last Friday of every month.

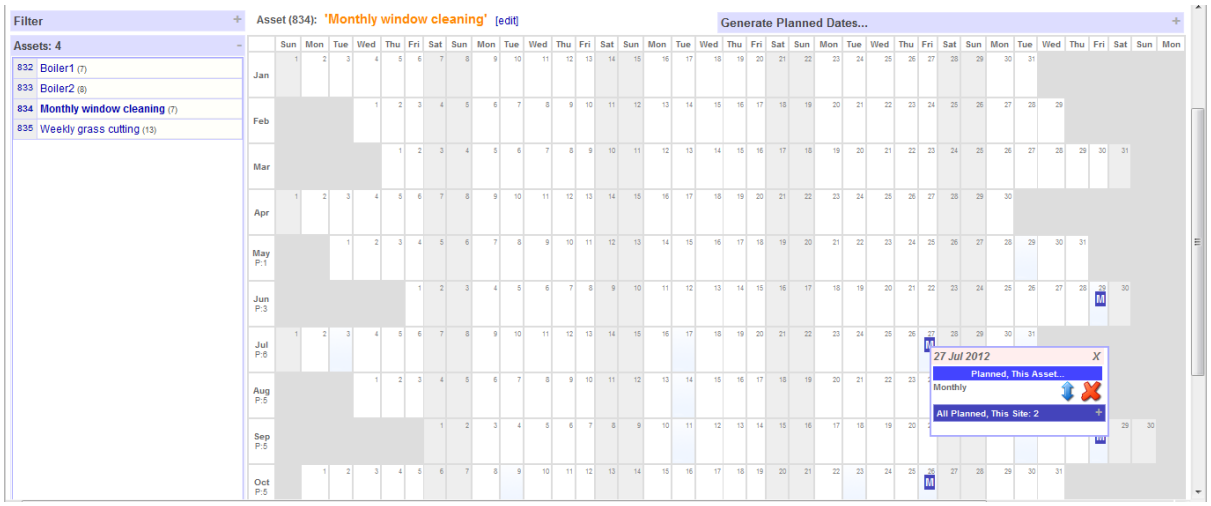


And on this one below, we have setup an annual maintenance on Boiler 2 (for the 29th May) based on the definition we had already setup on Boiler 1

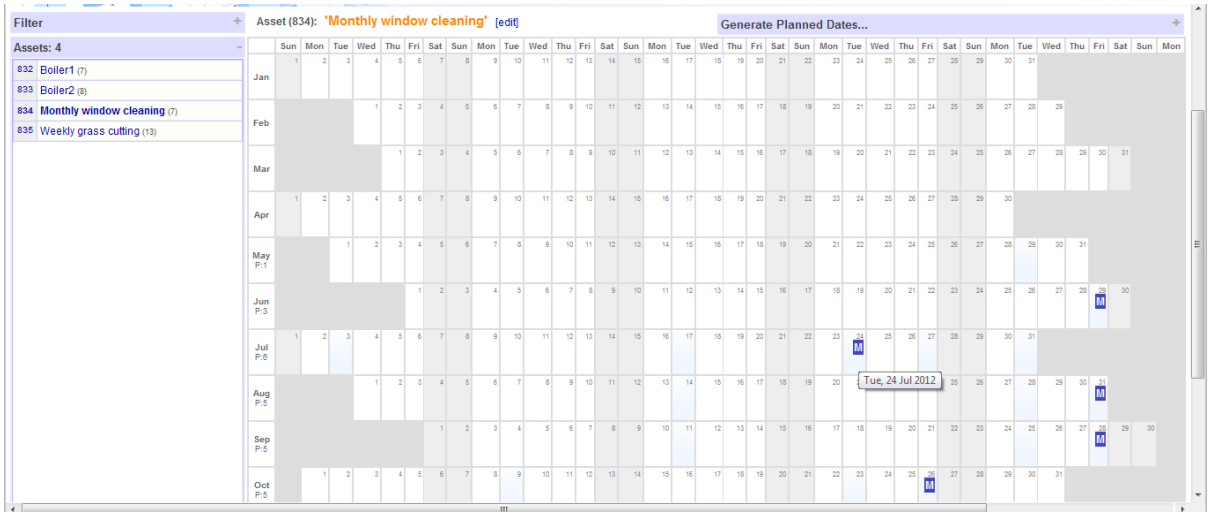


Moving a Scheduled Date

If you want to move a scheduled date, just click on the date block and a small window will appear as shown below. Click on the blue “up/down arrow”…

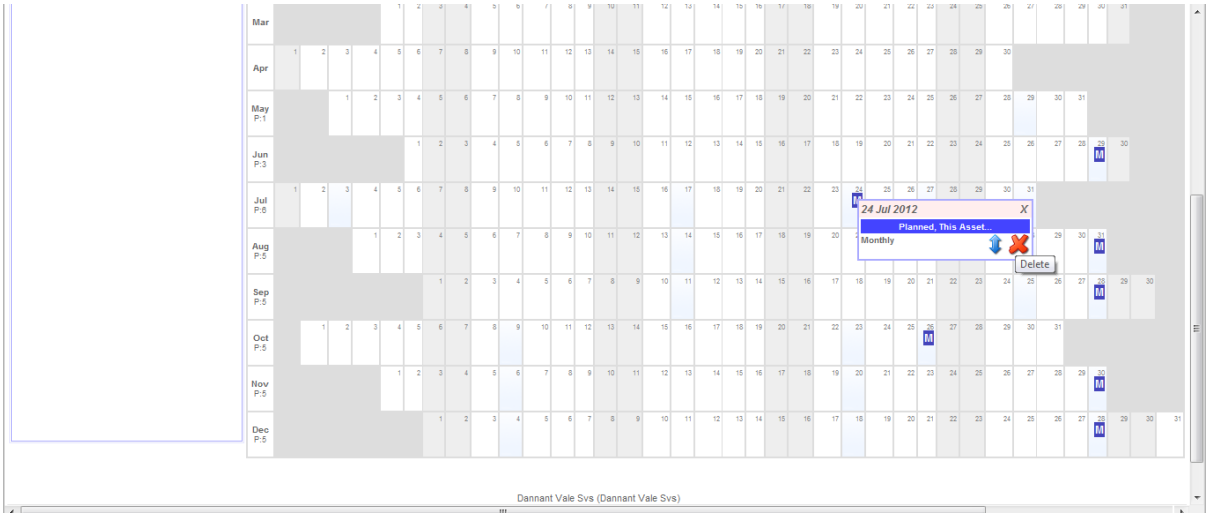


…..and then hover over the date where you want to move to (in our example it’s the Tue before the scheduled Friday), then click, and the block will be moved to the new date.



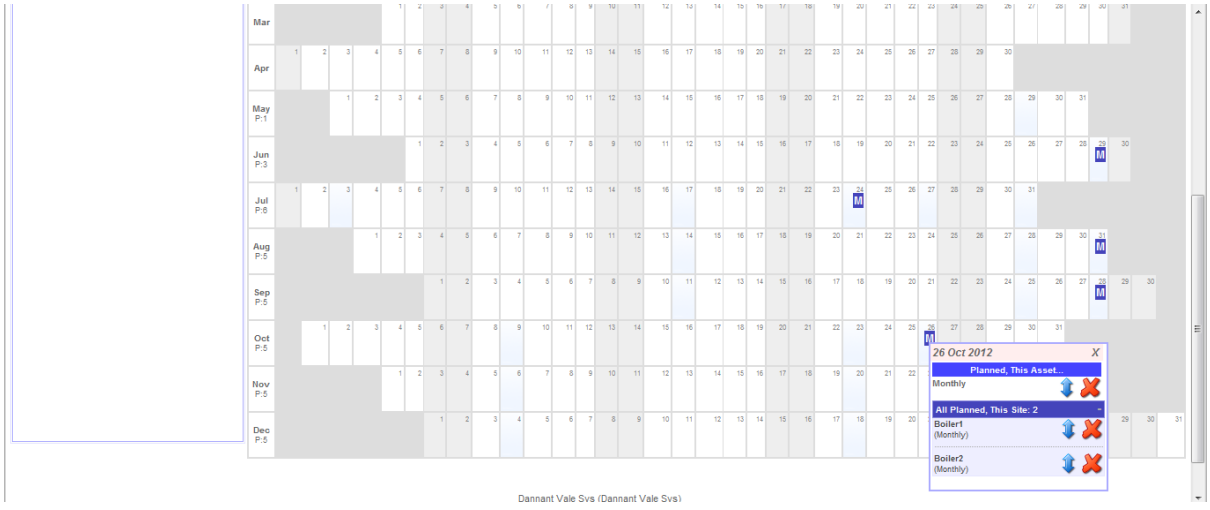
Deleting a Scheduled Date

If you want to delete a scheduled date, click on the date and then click on the red “x” delete icon -



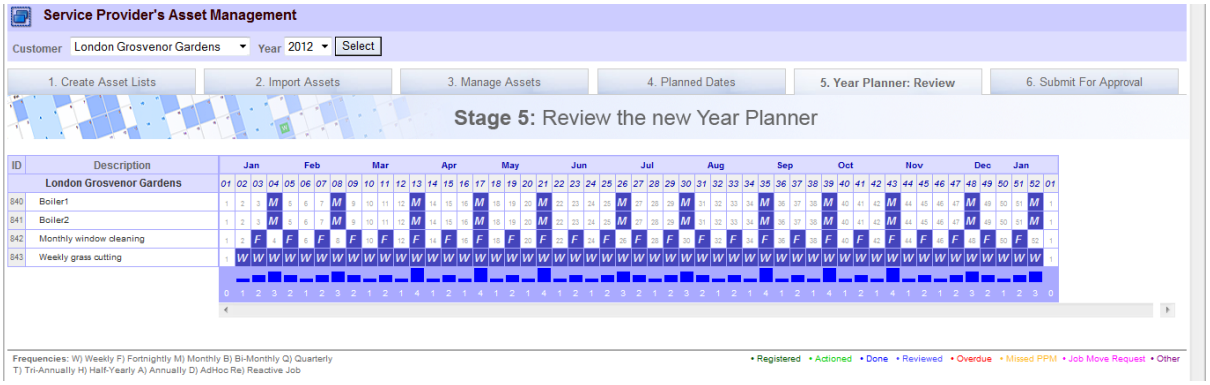
Balancing Your Work

If you have other jobs allocated on the same date, either at the same property or at another of the client’s properties, they will be displayed when you hover over the date.



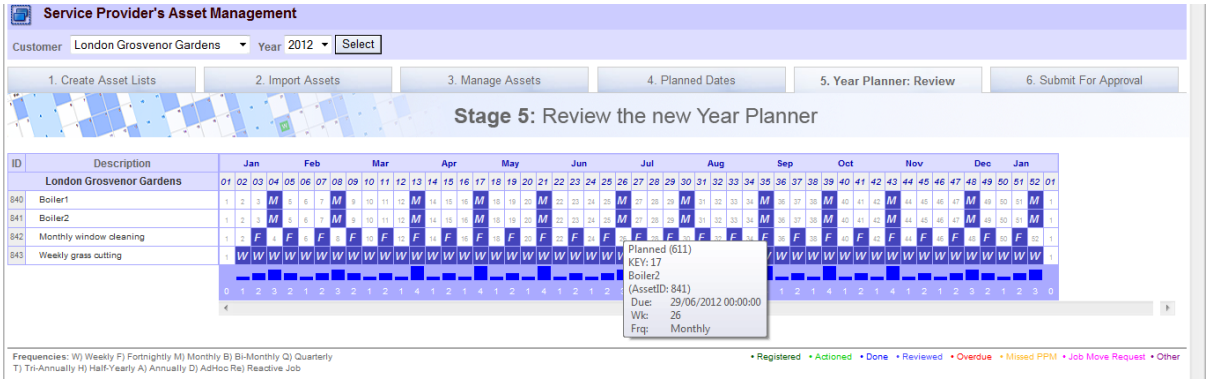
Stage 5: Review Your Planner

Once you have setup all your scheduled dates, you can view them in a consolidated planner, which you access via the tab labelled “5. Year Planner Review” -


Service Provider's Asset Management
Customer London Grosvenor Gardens
Year 2012
Select
1. Create Asset Lists
2. Import Assets
3. Manage Assets
4. Planned Dates
5. Year Planner: Review
6. Submit For Approval
Stage 5: Review the new Year Planner
ID
Description
London Grosvenor Gardens
840 Boiler1
841 Boiler2
842 Monthly window cleaning
843 Weekly grass cutting
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan
Frequencies: W) Weekly F) Fortnightly M) Monthly B) Bi-Monthly Q) Quarterly T) Tri-Annually H) Half-Yearly A) Annually D) AdHoc Re) Reactive Job
• Registered • Actioned • Done • Reviewed • Overdue • Missed PPM • Job Move Request • Other

There is a key at the bottom of the planner to explain the meaning of the letters, but they are fairly self-explanatory (W=weekly, F=fortnightly, M=monthly). Underneath each week column you will see a number showing how many jobs are tasks are allocated in that week.

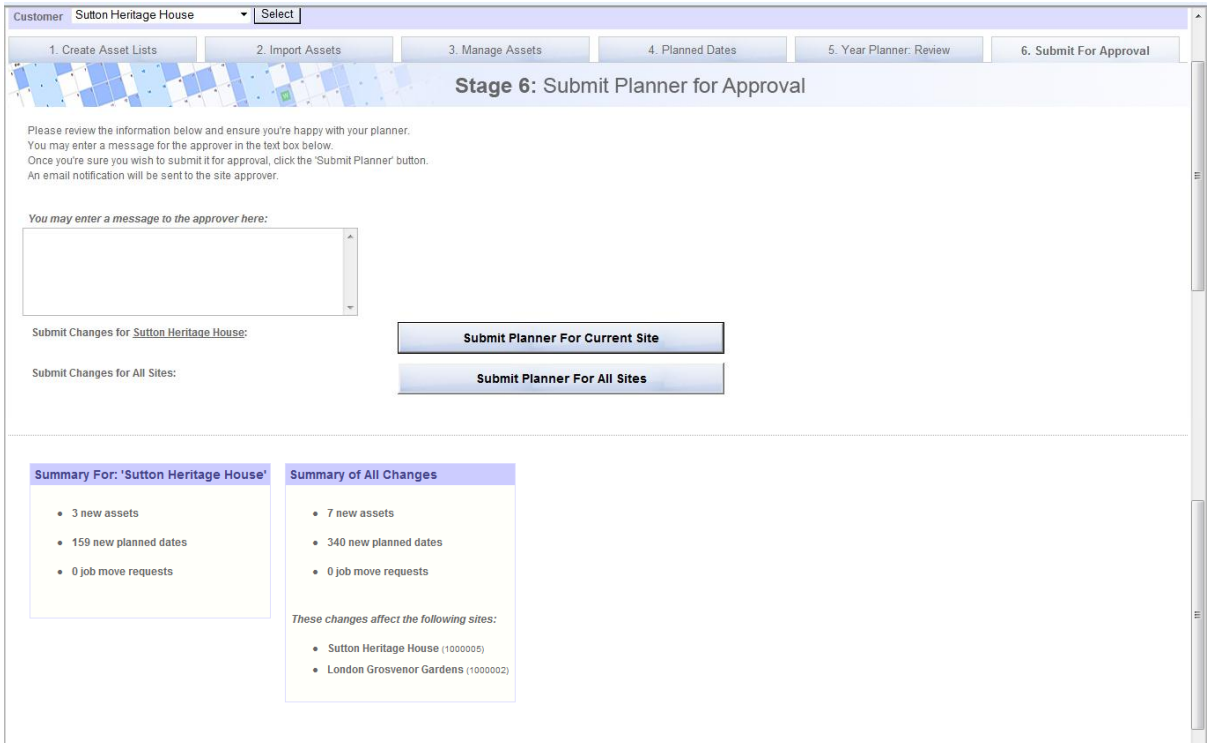
If you hover over any of the date blocks, it will show some summary information about the job or task -


Service Provider's Asset Management
Customer London Grosvenor Gardens
Year 2012
Select
1. Create Asset Lists
2. Import Assets
3. Manage Assets
4. Planned Dates
5. Year Planner: Review
6. Submit For Approval
Stage 5: Review the new Year Planner
ID
Description
London Grosvenor Gardens
840 Boiler1
841 Boiler2
842 Monthly window cleaning
843 Weekly grass cutting
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan
Planned (611)
KEY: 17
Boiler2
(AssetID: 841)
Due: 29/06/2012 00:00:00
Wk: 26
Frq: Monthly
Frequencies: W) Weekly F) Fortnightly M) Monthly B) Bi-Monthly Q) Quarterly T) Tri-Annually H) Half-Yearly A) Annually D) AdHoc Re) Reactive Job
• Registered • Actioned • Done • Reviewed • Overdue • Missed PPM • Job Move Request • Other

You can, if necessary, go back to the “4. Planned Dates” tab and move some of the planned dates around and then come back to the planner to re-preview.

Stage 6: Submit For Approval

When you are happy with your planner, you can then submit it for approval. This is done with the final tab, labelled “6. Submit For Approval”.


Customer
Sutton Heritage House
Select
1. Create Asset Lists
2. Import Assets
3. Manage Assets
4. Planned Dates
5. Year Planner: Review
6. Submit For Approval
Stage 6: Submit Planner for Approval
Please review the information below and ensure you're happy with your planner.
You may enter a message for the approver in the text box below.
Once you're sure you wish to submit it for approval, click the 'Submit Planner' button.
An email notification will be sent to the site approver.
You may enter a message to the approver here:
Submit Changes for Sutton Heritage House:
Submit Planner For Current Site
Submit Changes for All Sites:
Submit Planner For All Sites
Summary For: 'Sutton Heritage House'
3 new assets
159 new planned dates
0 job move requests
Summary of All Changes
7 new assets
340 new planned dates
0 job move requests
These changes affect the following sites:
Sutton Heritage House (1000005)
London Grosvenor Gardens (1000002)

- As you can see, at the bottom of the screen, a summary is provided of the **new assets** and **planned dates** that you have scheduled for the property you are viewing (in our example above that is Sutton Heritage House).

- If you have also uploaded assets and prepared a schedule for other properties, but have not yet submitted them for approval, these will be shown in the “Summary of all Changes” section.

- The two large control buttons in the centre of the screen allow you to submit the planner for the **current site** or for **all sites**.

- Towards the top of the screen, you will see a text box into which you can enter a message for the approver(s).

When you submit the planner(s) for approval, they will be sent to the approver(s) via email.

Elogbooks Facilities Management Ltd
Unit 30
Stephenson Road
St Ives
Cambridgeshire
PE27 3WJ

V2012.01